System Operating Model Evaluation Checklist

This checklist is designed to help teams evaluate system operating models—enterprise, hybrid, and custom—by making tradeoffs, assumptions, and long-term operational costs explicit. It is not intended to prescribe a single answer, but to support clearer decision-making about how systems should operate and evolve over time.

1. Context & Intent

- What problem are we trying to solve right now?
- Is this problem core to how we operate or largely commodity?
- Would solving this well meaningfully differentiate us?
- How stable do we expect requirements to be over the next 2–3 years?
- What would success look like one year after implementation?

> If the problem isn't clear, tool selection will be premature.

2. Operating Model Fit (Enterprise, Hybrid, or Custom)

- Which operating model are we intentionally choosing?
- Where are we willing to adapt workflows to platform assumptions?
- Where do we require flexibility beyond what a vendor provides?
- If hybrid, are boundaries between enterprise and custom layers explicit?

> Problems often arise when teams buy enterprise software but expect custom behavior.

3. Complexity & Adaptability

- Where will most complexity live in this system?
- How easy is it to understand the system end-to-end?
- How difficult will it be to make meaningful changes later?
- Are workarounds already emerging or anticipated?

> Hidden complexity tends to surface later, when it's most expensive to address.

4. Ownership & Responsibility

- Who owns outcomes when the system does not fit real workflows?
- Who debugs issues that span vendor and internal components?
- What expertise is required to operate or modify this system?
- What happens if key internal experts leave?

> Buying software can shift perceived responsibility, but operational accountability always remains internal.

5. Integration & Long-Term Cost

- What ongoing integration work will be required?
- How often will teams need retraining as systems evolve?
- How costly would it be to change operating models later?
- At what point would a different approach reduce long-term burden?

> Most long-term costs don't appear on the initial invoice.

6. Alignment Check

- Does our chosen operating model match how we intend to work?
- Are we comfortable with where complexity will accumulate?
- Are ownership and accountability aligned with control?
- Are we knowingly accepting long-term operational tradeoffs?